

Services Acquisition FIPT

8 Feb 2016

Attendees:

- Brennan, Kenneth, OUSD(AT&L)/DPAP Services Acquisition (SA FIPT Functional Leader)
- Sweeney, Scott, OUSD(AT&L)/DPAP Services Acquisition (SA FIPT Executive Secretary)
- Franko, Shirley, Navy SSM (Acting)
- Culpepper, Randall, USAF SSM
- Banks, Roxanne, DLA SSM
- DeSimone, Laura, MDA SSM (via phone)
- Thomas-Rizzo, René, Director, HCI
- Williams, Harold, Army Deputy SSM (Acting)
- Taylor, Sherry, Army OSSM
- Spisak, Craig, Army DACM
- Whitfield, Giselle, Army DACM Office
- Deskins, W. Mark, Navy DACM (via phone)
- Dunbar, Natalie, ASN RD&A (via phone)
- Ferreira, Roger, ASN RD&A DASN(AP) (via phone)
- Pickham, Jerry, AFPEO/CM (via phone)
- Trigg, Michelle, AF Deputy DACM
- Preisinger, Julia, SAF/AQ (via phone)
- Bolluyt, Robert, DHA
- Colvill, Al, DLA (via phone)
- Knight, Diane, MDA (via phone)
- Parker, Bill, DAU (via phone)
- Floyd, Larry, DAU
- Pilling, Randy, DAU
- Stroup, Adam, DAU
- Boissonniere, Richard, OUSD(AT&L)/DPAP Services Acquisition
- Middleton, Anita, OUSD(AT&L)/DPAP Services Acquisition
- Nuckols, Brian, OUSD(AT&L)/DPAP Services Acquisition
- Weinstein, Danny, OUSD(AT&L)/DPAP Services Acquisition (CTR)

I. Introduction

- a. DoDI 5000.74, "Defense Acquisition of Services," was signed by USD(AT&L) on 5 Jan 2016.
 - i. The DoDI has generated significant interest and has led to numerous speaking requests, including at the ACT-IAC Acquisition Excellence event on 22 Mar 2016 at the Grand Hyatt Washington (<https://www.actiac.org/acquisition-excellence-2016-0>). The SSMs are invited to participate in the panel at this event; if interested, please let

Danny Weinstein know. (NOTE: The panel is set; no additional participants are needed.)

- ii. In support of the DoDI communications plan, PDUSD(AT&L) will be supporting the “roadshow” to introduce the services acquisition community (including non-DAWIA personnel) to DoDI 5000.74. **ACTION:** Each MILDEP is asked to submit to Danny Weinstein three recommended locations or groups/audiences for the roadshow to target.
- iii. **ACTION:** Mr Brennan will distribute a slide deck on the DoDI to the FIPT members and gave permission for them to share the slides and/or post them on their organizations’ websites as appropriate.

II. Functional Services Manager (FSM) Curriculum

- a. At the Dec 2015 FIPT meeting, the Working Group was tasked with evaluating what training is needed for FSMs, whether the current course offerings provide the skills needed, and what courses might need to be added. The WG was asked to provide a preliminary assessment at the Feb 2016 FIPT meeting.
- b. The WG met on 1 Feb and also distributed inputs for discussion virtually. All input was received by 4 Feb. As of yet, no consensus has been reached, and this action is not yet completed.
- c. The first reference point discussed was from DAU’s briefing to PDUSD(AT&L) in Mar 2015, which provided a starting point for an FSM training curriculum, using courses already in existence: CLC 222 (COR Class), ACQ 165 (Defense Acquisition of Services), and CLC 011 (Contracting for the Rest of Us).
 - i. DAU was mindful of various resource constraints—time, course development funds, and travel/TDY funds for course enrollees.
 - ii. DAU noted that classroom courses require more staff and more demand forecasting than distance learning/online courses.
- d. Mr Sweeney then presented DPAP SA’s perspective.
 - i. Thresholds for FSMs may be set too high, since billion-dollar-plus contracts will have Program Managers, so there would be limited need to train FSMs. There was also discussion of whether PM coverage was complete and permanent. Air Force noted that both PMs and FSMs would have to be approved via the Air Force chain of commands (the service acquisition executive [SAE]).
 - ii. DPAP SA’s proposal was that all courses be offered online or as distance learning in the long-term, including the case-based ACQ 265 (Mission-Focused Services Acquisition), with taxonomy-specific supplementary material.
 - iii. In the near term, an existing program management course could be used, but in the long run, a “Program Management Skills for FSMs” course should be developed (approximately 22 hours of instruction), plus SA-specific CLC courses.
- e. The Air Force’s perspective was then delivered by Ms. Trigg:
 - i. Air Force proposed basing the FSM curriculum on the Project Management Institute’s (PMI) Project Management Body of Knowledge (the “PMBOK”). The proposal was not to use the actual PMI certifications, which are targeted more

towards industry, but rather simply to evaluate private sector best practices for inclusion in FSM curriculum.

- ii. DAU expressed concern with this proposal, cautioning that PMI-certified training courses are expensive and of inconsistent quality.
- iii. DAU commented that PMT 251, Program Management Tools Part I, may be the basis for a viable near-term option for an intermediate mid-career project management course. Approximately 75% of the current PMT 251 course objectives and materials could be used for a new course rather than the Air Force Institute of Technology (AFIT) course, FPM 101, Fundamentals of Project Management.

ACTION: Ms. Trigg will send Danny Weinstein the FPM 101 course syllabus from AFIT for circulation.

- f. The next proposal for an FSM training curriculum that the WG discussed was previously provided by the 4th Estate DACM, Mr Robert Daugherty.
 - i. This proposal includes DAU's 1.5- to 2.5-day Risk Management Workshop, which focuses on aspects of risk management that are not covered at a service acquisition workshop (SAW), especially a single-phase SAW.
 - ii. This proposal also includes the Leading Project Teams Workshop, additional project management material provided by DCMA, and the mid-level BCF 220/225 (Acquisition Business Management Concepts). DAU believes that 100-level courses would be more appropriate.
- g. The next proposal discussed was delivered by DLA.
 - i. This proposal includes ACQ 315 (Understanding Industry [Business Acumen]), HBS 428 (Negotiating), and, when necessary, ACQ 230 (International Acquisition Integration).
 - ii. DAU believes that ACQ 230 is not appropriate because it is not targeted at services.
- h. The final proposal discussed was submitted by Army.
 - i. Core training would include coursework on services acquisition, risk management, contracting, business management, earned value management (EVM), and project management.
 - ii. There was discussion about whether EVM is applicable to services, but Army believes it can be used for services, even for a level-of-effort contract.
 - iii. The Army's approach to FSM training is a tiered approach (levels I, II, and III, based on dollar value threshold/service acquisition category [S-CAT]), which was well-received by the FIPT in support of the effort to strike the proper balance between meeting training requirements and being mindful of time constraints.
- i. Other considerations in developing an FSM curriculum:
 - i. Consider grouping together Risk Management, Negotiation, Financial/Cost Analysis, and other skills into a single "Program Management Skills for Services" course that would consist of multiple modules.
 - ii. Avoiding overwhelming the DAU classroom schedule and available seats (such as for ACQ 265) if a course is made mandatory when it was not previously so. If ACQ 265 is made mandatory, an implementation plan would be necessary in order to avoid overwhelming current resources.
 - iii. Being mindful of agency-funded travel costs for Priority 3 and Priority 4 students.

- iv. Whether services training would be provided solely by DAU or would be supplemented by training from equivalent providers.
- v. MILDEP-specific guidance and how it relates to DoD-level guidance (such as DoDIs).
- vi. Whether a Service Acquisition Workshop (SAW) is the equivalent of ACQ 265 for fulfillment purposes. (It was agreed that the two are not equivalent, given that a SAW is a customized consulting event that is different for each program/procurement and ACQ 265 is a classroom course.)
- vii. Whether dollar thresholds are necessary, in light of the fact that the new DoDI 5000.74 includes S-CAT thresholds.
- viii. Whether required curricula should be customized to the individual, given that each person has his or her own experience, prior training/degrees, and work requirements.
- ix. Whether special consideration in training curricula—such as specialized case studies—is needed for various functional areas.
- j. Next steps:
 - i. **ACTION:** The FIPT will consolidate the inputs/proposals for FSM training, adjudicate conflicts, and make 2–3 recommendations for FSM training options, which will be presented to the SSMs.
 - ii. The SSMs will meet in a special session on 1 Mar in Pentagon room 3C146, with the goal of reaching consensus on the curriculum. If no consensus is reached, the Functional Leader will make the final decision. Once the focus areas are agreed upon, then the FIPT can prioritize among the curriculum components.
 - iii. PDUSD(AT&L) will ultimately be briefed on the SSMs' selection of an FSM training structure.
- k. In DoDI 5000.74, the only requirement for training and certification is for the largest-dollar-value programs.
 - i. The FIPT likely cannot require FSM training because FSM is not a career field, but a functional area.
 - ii. The FIPT can, however, recommend courses and/or demonstration of equivalency of skills. Moreover, MILDEPs/Agencies could add requirements over and above the FIPT's recommendations; the FIPT's recommendations are simply the minimum training recommended.

III. Update on Air Force Coding Pilot

- a. Air Force concurrence is needed on the revised USD(AT&L) memo on establishing the Services Acquisition Manager functional area and the Air Force Coding Pilot.
- b. Once Air Force concurrence is given, the package can be signed.

IV. Closing

- a. The HASC's FY15 Annual Review of Acquisition of Services Policy & Oversight is being finalized and is due 29 Feb. This is *not expected* to be an annual requirement.
- b. The SASC is supportive of the progress being made on services acquisition—specifically the signed DoDI and the progress on training being made by the FIPT.
- c. The next DPAP SA training conference will be held 27 Jun – 1 Jul at Southbridge.

- i. DPAP SA is targeting more MILDEP participation this time than at the Dec 2015 conference; however, there will still be 4th Estate representation.
 - ii. This conference will include two cases studies, down from three in Dec 2015.
 - iii. This conference will also include an additional speaker or panel.
 - iv. More information will be provided at the April FIPT meeting.
- d. **ACTION:** DAU requested participants in the online ACQ 165 pilot, planned for April. If interested, please e-mail Randy Pilling.
- e. **ACTION:** Ms. Banks requested feedback on the 4th Estate Services Requirement Review Boards (SRRBs) at the next FIPT meeting.

V. Key Dates

- a. 1 Mar: Special meeting of SSMs on FSM curriculum
- b. 17 Mar: SA FIPT WG meeting
- c. 11 Apr: SA FIPT meeting
- d. 19 May: SA FIPT WG meeting
- e. 2 Jun: SA FIPT meeting
- f. 27 Jun – 1 Jul: SA training at Southbridge